



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Applications Services Unit Manager

Job Code Title

Program Manager II

Pay Band

7b

Job Code Number

111917

Information Technology and Processing Division

Information and Technology Services Bureau
Applications Services Unit

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Information Technology and Processing Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information and Technology Services Bureau (IT) and Processing and Retention Operations Bureau (PRO) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Information and Technology Services Bureau provides application development and support services for all revenue information systems including network services to approximately 650 users from a central office in Helena and to 60 locations in the state's 56 counties. Depending on need, services are provided either with a site visit or using remote-access technologies. The bureau includes the Network Services Unit and the Applications Services Unit.

Job Responsibilities

The Applications Services Unit Manager analyzes and designs customized technology systems based on the requirements of available IT systems, departmental needs, budgetary requirements, and user ability. The incumbent is responsible to upper-management for evaluating and recommending technical development of information systems and has primary responsibility for project management, systems analysis, systems design, maintenance, data quality, technical assistance, and problem resolution relative to computer applications on any platform. This position reports to the IT Bureau Chief and supervises unit staff.

- **Staff Leadership, Management, and Supervision 50%**

The incumbent is responsible for leading staff and managing the day-to-day activities of the unit. Responsibilities include monitoring the progress of work plans, goals, and objectives and aligning them with the department's goals and priorities. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to

accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.

2. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
3. Maintains an atmosphere of safety within the unit. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
4. Makes and accepts responsibility for decisions necessary to carry out the unit's mission.
5. Accepts direction and feedback from supervisors and follows through appropriately.

Management

1. Conducts strategic planning in coordination with the bureau chief to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; unit needs; and other factors to integrate requirements and resources into program plans.
4. Establishes priorities, deadlines, and work plans for program activities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Reviews and monitors progress through meetings and consultations. Conducts staff meetings, disseminates data, and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, unit performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.
9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the unit follows department expectations regarding disclosure and employee confidentiality.

Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.

3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, and procedures.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **Project Management 30%**

1. Directs the research, planning, design, and implementation of new technologies. Develops and coordinates proposals for new information technology systems including costing and staffing options. Confers with computer systems analysts, computer programmers, and others to design systems and to obtain information on project limitations and capabilities, performance requirements, and interfaces. Modifies existing software to correct errors; allow it to adapt to new hardware; or to improve its performance. Analyzes user needs and software requirements to determine feasibility of design within time and cost constraints.
2. Manages the development of applications to meet the department's goals and objectives. Implements new technology. Sets standards. Identifies user needs to be met in systems development. Monitors technical areas of responsibility. Develops standard operating procedures for those areas to bring improved efficiency and effectiveness to the work unit. Works with Department of Administration Information and Technology Services Division (ITSD) to plan infrastructure growth and evolution. Manages all applications projects from beginning to end.
3. Evaluates new legislation, policies, and rules. Identifies potential technological impact. Prepares fiscal notes. Recommends implementation methods, procedures, and time frames. Analyzes business rules and practices for computer applications that may cross interagency lines of authority.
4. Organizes and directs major information and application projects. Prepares project work plans to organize and direct teams of computer systems analysts and programmers and coordinate unit work. Sets and monitors the project schedule. Plans for full implementation. Deals with issues as they arise. Schedules, assigns, and evaluates analysts' and programmers' work. Determines if staff need to be reassigned based on project priorities and changes in organizational direction.
5. Acts as the liaison between the Applications Services Unit and its user community regarding the development of network and security plans. Communicates using language understandable to both groups. Leads ad-hoc project teams. Represents the bureau and the department in technical counsel as needed.
6. Manages and performs proactive monitoring of all technical areas of responsibility. Develops standard operating procedures for those areas to bring improved efficiency and effectiveness to the work unit. Manages complex technology-related projects from inception to completion.

7. Directs research and evaluates the business processes, environments, and objectives of users to draft, implement, and support plans for the development and maintenance of the various computer systems and applications.
8. Assesses the impact of changes in technology, state and federal requirements, and bureau operations. Determines methods to increase efficiency. Reviews bureau policy to ensure continued compliance. Consults with customers about software system design and maintenance to provide the services needed.

- **Computer System Analysis and Design 15%**

1. Evaluates agency business processes, system specifications, associated costs, and applicable policies and procedures. Consults with users and management. Researches technical documentation to determine the project feasibility and analyze the costs and benefits of various system designs. Develops system specifications. Provides technical assistance to staff, the user community, and management. Develops system design concepts.
2. Analyzes information to determine, recommend, and plan applications specifications. Develops and implements user specifications and modifications to existing software to correct errors; adapt it to new hardware; or improve its performance. Confers with systems analysts, engineers, programmers, and others to design system and to obtain information on project limitations and capabilities, performance requirements, and interfaces.
3. Analyzes agency operations in support of user requests. Develops knowledge and understanding of the current environment of the agency by interviewing agency personnel at all levels; researching written procedures, policies, and statutes; and interviewing non-agency personnel.
4. Conducts preliminary assessments of agency operations with regard to the potential for automation. Information gathered helps the supervisor determine a proper course of action and the most appropriate project staffing and is often requested as part of the budgetary planning process. Results of these assessments are used by the agency for budget requests and justification.
5. Identifies alternative solutions to satisfy problems and requirements. Analyzes information and knowledge gained about the organization and its needs and requirements. Researches solutions developed by other professionals. Applies personal business, analytical, and technical knowledge and skills.
6. Programs and implements customized technology by developing program specifications and modifications. Sets standards and processes for integration, system testing, and system implementation in production environment. Prepares system and user documentation and training. Oversees the development and maintenance of customized applications within established timeframes to meet the goals of individual work units and departmental objectives. Identifies potential limitations, threats, and liabilities to current systems. Works with systems analysts, engineers, programmers, and the computer security specialist to ensure the system design meets all performance requirements.
7. Prepares policies, administrative rules, and proposed legislation to address program needs. Determines the effects of legislative proposals. Assists in developing fiscal notes. Researches and analyzes current program operations. Develops justifications and documentation for legislative proposals. Reviews current statutes and laws of Montana and other states. Develops proposed legislation and administrative rules to implement needed changes. Provides testimony at legislative hearings to justify and defend proposed legislation. Coordinates with legal staff on the development of administrative rules.

- **Other Duties 5%**

1. The incumbent performs a variety of other duties as assigned by the supervisor.
2. Conducts or coordinates special projects.
3. Represents the department at meetings and conferences. Attends ongoing training.

4. Oversees contractors and vendors working on department projects to ensure contract compliance, provide technical and administrative oversight, and to coordinate contract services with department staff activities and project needs. Defines the scope of work; reviews and monitors work and progress; makes project decisions; and evaluates contractor recommendations.

Job Requirements

To perform successfully as a unit manager, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Strong communication skills and the ability to communicate effectively and respectfully are required. The incumbent is required to analyze complex issues; identify others' underlying concerns and motives; deal with controversy and hostility in a professional and objective manner; establish effective relationships with others; and work effectively under pressure. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. It is essential that the incumbent has the ability to work independently but also as part of a team; maintain a high performance team; make sound decisions and be accountable for them; generate innovative ideas; and have personal initiative. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. Incumbent is required to exercise discretion and judgment in handling confidential and sensitive information.

The position requires knowledge of the concepts and theories of revenue program administration; applicable state and federal regulations, statutes, and policies; computer science; structured information systems, documentation, implementation, maintenance and security related functions; large scale computer systems and related equipment; networking; and communication protocols; the principles and practices of public information and education; and presentation methods and techniques. Knowledge of general management practices including strategic planning; principles and methods of work planning; performance management including setting goals, objectives, and measures; operational and program planning; quality assurance methods; organizational development; project management; governmental organizational structure, accounting, and budgeting; and legislative and administrative rule processes and guidelines is required. The work also requires knowledge of computers and database management including state and department information systems (GenTax, TAP, ORION, SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; business communications; records management; state and federal funding requirements; agency policies, procedures, and guidelines; supervisory principles and practices; department and state personnel policies, procedures, and precedents; and employment law.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in computer science or closely related field and five years of job-related experience including two years of supervisory and/or management experience.
 - Work experience should include applications development and project management experience.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.

- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all functions of the unit. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. May involve minimal travel therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____